PW DU PLESSIS

Financial Advisor

For many people, financial planning can feel complicated, overwhelming and difficult to know where to begin. My role as a financial adviser is to make that process simpler. I believe good financial advice should be honest, accessible and practical giving you the confidence to understand your options and make informed decisions about your financial future.

I have been working in the financial services industry for over 3 years, including three years as a Broker Consultant. This experience gave me an in-depth understanding of financial products, processes and the practical considerations that can influence the outcomes of financial decisions. Today, I bring that product and process expertise into my work as a financial adviser, using it to help clients navigate complex financial solutions with greater clarity and confidence.

My decision to become a financial adviser was also shaped by personal experience. I have seen first-hand how the consequences of poor financial planning can extend far beyond a policy or investment statement and affect an entire family. That experience shaped my purpose: to help ensure that the people I advise have access to financial advice that is clear, considered and aligned with their needs.

I work with young professionals, business owners and professionals who want to take greater control of their financial futures. Whether the goal is building wealth, investing for the future, preparing for retirement or protecting the people and assets that matter most, I believe the right financial plan starts with understanding the individual behind the numbers.

My approach is straightforward. Financial products and concepts can often be complex, so I focus on explaining them in a way that is easy to understand and, importantly, easy to implement. I do not believe clients should need to be financial experts to make good financial decisions. My responsibility is to provide the expertise, explain the options and help clients understand the potential consequences before making a decision.

My previous experience as a Broker Consultant also gives me a detailed understanding of financial products, provider processes, terms and conditions and the practical considerations that can sometimes be overlooked. I approach every recommendation with diligence and carefully consider how a solution fits into the bigger picture of a client's financial plan. My areas of advice include retirement planning, investment planning, wealth planning, life and risk insurance, car and home insurance, and business insurance. I have particular experience in investments, life insurance and protecting businesses through solutions such as buy-and-sell insurance, key person insurance and contingent liability cover.

At the heart of everything I do are two values: integrity and diligence. I measure my advice against a simple standard is it honest, is it understandable, and is it genuinely accessible to the client?
My goal is not simply to recommend financial products. It is to help clients understand their financial position, identify opportunities, protect what they have built and work towards the financial goals they want to achieve.

Financial planning should not be intimidating. With the right advice, it can become a clear and manageable process. That is the kind of relationship I aim to build with every client: one based on expertise, transparency and the confidence that comes from knowing you have a financial adviser who is genuinely focused on your best interests.

PW Du Plessis

Financial Advisor

CONTACT

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PW Du Plessis

QUALIFICATIONS

Higher certificate in Economics and business management

BUSINESS EXPERIENCE

Discovery | Broker consultant| 2024 - 2026

Brightrock| Broker consultant| 2023 - 2024

Discovery | attooh! HEALTH | WEALTH | LIFE

DOES YOUR MONEY NEED A "PROFESSIONAL TRAINER"?

Imagine a world where finance is associated with **LIFE, TIME** and **GROWTH** rather that **ANXIETY** and **STRESS**? At attooh! We believe that your financial journey should and could be a journey of enjoyment, fulfilment and escalating success.

It really is time to put **YOU** first. Take control of your finances and allow me, as your Financial Coach to guide you along the way.

MY SERVICES INCLUDE

INDIVIDUAL / FAMILY INSURANCE

- Life cover
- Disability
- Severe Illness
- Income continuation benefit
- Tax Free Investment/savings
- Retirement planning
- Educational savings

PERSONAL BANKING

WILLS & ESTATES

HEALTH

- Medical aid
- Gap cover

INVESTMENTS

- Local, guaranteed and offshore
- Retirement investments

SHORT TERM INSURANCE

- Personal lines
- Commercial insurance

EMPLOYEE BENEFITS

- Group Risk
- Retirement Funds
- Group Health Solution

VITALITY REWARDS

- Wellness management
- Wellness days

Every client is unique and so is my process in my practice. Allow my team and I to create a personalised, tailor-made financial solution for you. My advice is based on your needs and wants and I will truly commit to your overall financial and holistic success. **Financial freedom could be your reality.**

THE BUTTERFLY EFFECT

The butterfly with its metamorphosis - alludes to our lives as humans. Change is the ONLY constant. We celebrate growth, change and your own personal metamorphosis. We'll be there on the journey to guide and assist you toward a life of "permanent purpose".